

## USPTO PATENT FULL-TEXT AND IMAGE DATABASE

<a href="#">Home</a>	<a href="#">Quick</a>	<a href="#">Advanced</a>	<a href="#">Pat Num</a>	<a href="#">Help</a>
<a href="#">Bottom</a>		<a href="#">View Cart</a>		

Searching 1976 to present...

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(((((CCL/705/\$ AND "financial advisor") AND portfolio) AND suggest\$) AND chang\$) AND evaluat\$): 6 patents.

Hits 1 through 6 out of 6

Jump To	<input type="text"/>
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Refine Search	ccl/705/\$ and "financial advisor" and portfolio and sug
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PAT. NO.	Title
1 <a href="#">6,370,516</a>	<a href="#">Computer based device to report the results of codified methodologies of financial advisors applied to a single security or element</a>
2 <a href="#">6,349,290</a>	<a href="#">Automated system and method for customized and personalized presentation of products and services of a financial institution</a>
3 <a href="#">6,240,399</a>	<a href="#">System and method for optimizing investment location</a>
4 <a href="#">6,064,986</a>	<a href="#">Computer assisted and/or implemented process and architecture for customer account creation, maintenance and administration for an investment and/or retirement program</a>
5 <a href="#">6,021,397</a>	<a href="#">Financial advisory system</a>
6 <a href="#">5,918,217</a>	<a href="#">User interface for a financial advisory system</a>

<a href="#">Top</a>		<a href="#">View Cart</a>		
<a href="#">Home</a>	<a href="#">Quick</a>	<a href="#">Advanced</a>	<a href="#">Pat Num</a>	<a href="#">Help</a>